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ABSTRACT

This handbook is intended for managers who wish to develop human resources in their organizations, particularly where women are currently underrepresented. It provides a positive model for the successful equal opportunities manager and a checklist of activities that will lead to the successful implementation of equal opportunities. The handbook sets out a logical sequence of recommended tasks for the development of an equal opportunities policy. The 11 steps are as follows: (1) management activities--the first stage; (2) management activities--the second stage; (3) the monitoring process; (4) the staff development program; (5) the equal opportunities training program for staff; (6) recruitment, appointment, and promotion of women; (7) the management development training program; (8) the facilities required for implementation of equal opportunities; (9) a model for curriculum development; (10) marketing and publicity; and (11) management activities--the third stage. A statement of principle and a list of the tasks the manager should carry out to translate the principle into effective practice are provided for each step. Appendixes include two articles, "Equality in the College: The Legal Position" (Chris Fernie) and "How to Set Up and Implement an Equal Opportunities Policy" (Helen Clarke). A sample opportunities policy document is also provided. (YLB)

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PLANNING HUMAN RESOURCE DEVELOPMENT

THROUGH EQUAL OPPORTUNITIES

A HANDBOOK

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PLANNING HUMAN RESOURCE DEVELOPMENT

THROUGH EQUAL OPPORTUNITIES

A HANDBOOK

JILL WARWICK

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Data provided for this handbook derived initially from 200 colleges which responded to the FEU's survey of equal opportunities policies and practices, of which 50 agreed to give a more detailed response: interviews were held with practitioners who attended FEU conferences in Manchester and London. A further contribution was requested from 25 individuals or organisations involved in further education, since it was felt they would be able to give a realistic picture of the current state of the implementation of equal opportunities (gender) policies and practices.

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FOREWORD

This handbook particularly refers to and examines gender issues in relation to equal opportunities policies and practices. While it is acknowledged that issues of race, class, sexual orientation and special needs intensify the difficulties inherent in ensuring the implementation of equal opportunities, greater effort is needed to ensure that women are not disadvantaged through them.

Many of the suggestions contained in this handbook may be applicable to multicultural and special needs education, but these issues are specifically addressed in parallel FEU documents*.

This document is intended to be an authentic reflection of the experience of those involved in the implementation of such policies in further education colleges; it draws heavily on the experiences which practitioners have recorded, very often making positive recommendations for the implementation of equal opportunities having learned from earlier deficiencies they had to report.

Geoff Stanton
Chief Officer
Further Education Unit

* *Planning NAFE — Equal Opportunities For Ethnic Minorities* FEU, 1988

Planning FE — Equal Opportunities for People with Disabilities or Special Educational Needs FEU, 1990

INTRODUCTION

In the current economic and political climate, where colleges increasingly find themselves in the position of having to market education, a more intensely competitive element has entered the FE field than ever before.

However, the results of this FEU research project show that college managers, already under pressure in trying to maximise the efficiency of their organisation are, in fact, overlooking a resource which is already within their ambit because of out-of-date attitudes which may be displayed towards female staff and students.

MANAGEMENT PLANNING

Managers in further education, who need to maximise the human resources which are available to them in the difficult years ahead, have to appreciate, just as managers in commerce and industry have done, the value to the organisation of the practice of equal opportunities, since it allows for the development of individuals and their talents.

WOMEN AND EMPLOYERS

Over the past five years, women in commerce and industry have been proving, ever more frequently, that they have skills which had until now been largely regarded as male prerogatives. Areas of employment such as finance, marketing, managing, engineering and information technology no longer show a marked gender bias. Commercial and industrial employers are now assiduously encouraging young women to enter and stay in their organisations. They are valuing the contribution that women can make to the organisation as colleagues of equal status with men and, indeed, welcome the fact they may have particular skills to offer in terms of human resource management and personal and interpersonal skills. Employers who are models of good practice in the recruitment and employment of women, know that both demographic trends and the increasingly expensive cost of training means that holding and developing good staff, both male and female, **is a vital investment**.

ATTITUDES

Economic exigencies have clearly affected commerce and industry and led to changes in attitudes and employment practices regarding women. Since colleges are now being encouraged to run themselves on commercial lines, they would be wise to draw on recent experience in these fields.

ACTION TASKS IN IMPLEMENTING EQUAL OPPORTUNITIES POLICIES AND PRACTICES

This handbook is aimed at all managers who wish to develop human resources in their organisations, particularly where women are currently under-represented, for economic reasons and for the benefit of all employees. It is designed as a management tool providing:

- a positive model for the successful equal opportunities manager
- a checklist of activities which will lead to the successful implementation of equal opportunities policies and practices
- a reference section

This handbook sets out a logical sequence of recommended tasks which, if carried out, should result in an equal opportunities policy being implemented. The authors have been able to compile a comprehensive list of steps to be taken by assuming a synoptic overview, and by drawing from examples of both good and bad equal opportunity practices. There are necessarily some simplifications and some assumptions about the level of understanding of the issues involved, but these have been made in the interests of ensuring the handbook is not so complicated that it becomes difficult to use.

The list may seem alarmingly long, but the compilation of tasks is a comprehensive one and tries to address all the issues and present solutions to some of the problems that may occur in implementation.

A POSITIVE MODEL FOR THE MANAGEMENT OF EQUAL OPPORTUNITIES

'Our value system is based on the principle that each member of the college staff makes an equal contribution to the effective and efficient running of the college, irrespective of whether they are a teaching member or a teaching support member of staff, and irrespective of their grade. We describe ourselves as task orientated, but also people orientated. We believe that people need to be able to develop themselves and grow themselves, if they are going to perform their jobs effectively and efficiently.'

Ann Limb, Principal, Milton Keynes College

The evidence indicates that the management of equal opportunities is an aspect of professional competence, and that when it is effectively managed the organisation will flourish through the proper use of its available resources.

The key to success in the implementation of equal opportunities lies in:

- commitment by the senior management to a value system which sees human resource development as vital to the continuation of the organisation;
- clear leadership in the implementation of this value system;
- firm and public support for equal opportunities within this value system;
- real and adequate resources for the implementation of equal opportunities.

From the research findings emerges a series of signposts for managers which will lead through a programme of continuing professional development to a set of competences in human resource management.

1. Senior managers should recognise that the implementation of equal opportunities practices is central to the development and continuing success of the organisation.
2. The attitudes of managers may be in need of examination and change. This change in previously held attitudes may be difficult and may not necessarily be achieved without some discomfort. Any training needed to cope with this must be of high quality and of proven value, and will often need to be sought outside the institution.
3. Managers have to lead by example in the implementation of equal opportunities practices. So often the ethos and culture of the college is set by the personal style of its most senior managers, and an integrated approach of practical activities which mirror the value system is essential for success.
4. The colleges that are managing equal opportunities implementation effectively all show a strong commitment from the leadership to a value system which appreciates human resources; a developing self-knowledge which evolves from honest self-appraisal; a willingness to evaluate; and a lack of fear in instigating change on the basis of that analysis.

   'I believe that a central function of senior management is to offer leadership over value systems. My own value system makes me feel that social relationships that are based on co-operation, affection and reason produce happier and more effective people than those based on intimidation, violence and power.

Equal opportunities and gender issues raise. . . questions of values, of power and of freedom that seem to me central to the health of any organisation. . . I therefore feel that equal opportunities policy related to gender is an appropriate vehicle for confronting questions that are very important to the central health of the institution. Working on gender issues is not peripheral: it deals with tasks that should be a college's prime concern'

Guardino Rospigliosi, Principal, Plymouth College of Further Education

Some colleges are managing to implement effective equal opportunities practices, but the research suggests that there is no fixed pattern to their strategies for implementation. However, the colleges which are successfully implementing equal opportunities share a common ground in terms of management style and set of values. There is an apparent contrast, too, which one might assume is not unrelated to the value system of the management, in the understanding of equal opportunities issues, and attitudes towards them; between those who are endeavouring to maximise their human resources, and those who are not developing them with the same efficiency and concern for employees.

'Our mission statement describes the college as an entity in its service to the community and it has six ideas running through it. The first is that we are primarily about **personal achievement**, and that means the involvement and empowerment of learners, and behind both of these is inevitably the **involvement and empowerment of staff** — they go together. **Needs analysis and responsiveness** — the fact is we are not dealing with an off-the-shelf curriculum for compliant students, but we are thinking about needs analysis and design. **Self-appraisal and evaluation** — we are interested in self-appraisal and self-evaluation; we want to develop an alertness to ourselves and our characteristics.

We are interested in a notion of **human resource development** rather than personnel management; we concentrate on the unique contribution that staff can make, rather than control and duty. We are ensuring that we build up the capabilities of the staff for the future — we train for the future with both our staff and students, for we don't have a future without them. In terms of organisational management, one should be reflective. You cannot have ideals for the system and not perform in accordance with them yourself. You have to have integrity and organisations have to have integrity. We favour an "all through" approach and that means actually knowing what we take seriously and what we don't and being prepared to spend time on these things and get senior managers to analyse where they are going.'

Jenny Shackleton, Principal, Wirral Metropolitan College

CHECKLIST FOR GOOD MANAGEMENT OF EQUAL OPPORTUNITIES

- Take the lead in setting a value system that demonstrates that all are recognised for their worth and as equal contributors to the efficiency and well-being of the college.
- Make it clear that equal opportunities policies and practices have senior management support.
- Be prepared to develop the ability to examine and make changes in your own attitudes and behaviour on gender issues and **encourage others to do so**.
- Develop an understanding of the issues involved in equal opportunities in organisations.
- Work co-operatively with colleagues to form an equal opportunities policy and action plans for its implementation.
- Evaluate the need for, then find and deliver sufficient resources to implement, equal opportunities policies and practices.
- Develop structures for the implementation of equal opportunities policies.
- Take responsibility for ensuring implementation of equal opportunities policies and practices.
- Assume the lead in undertaking equal opportunities training.

1. MANAGEMENT ACTIVITIES — THE FIRST STAGE

STATEMENT OF PRINCIPLE

It is important for managers to appreciate that the implementation of equal opportunities policies and practices is sound management practice. However, the attitudes and behaviour of managers is a crucial factor concerning the effective implementation of such policies.

IN PRACTICE

To translate principle into effective practice managers need to:

- make a real commitment to equal opportunities policies within the management team;
- communicate this commitment to the staff, students and trade unions;
- negotiate support for this commitment with the LEA, governing body, staff and student unions;
- designate a senior member of the team as the person with special responsibility for equal opportunities and allow time to enable duties to be carried out;
- provide high quality training for the management team in the implementation of equal opportunities policies and practices;
- set up an equal opportunities working party with a broad membership, including teaching and support staff, students, trade unions, governors and representatives of the LEA, with the aim of formulating an equal opportunities policy and writing the document;
- negotiate the working party brief with its members;
- arrange for the collation of an information base which:

  a) records student populations and balance in courses by both gender and race

  b) records posts and responsibilities of teaching and support staff, mapping them by both gender and race;

- publish this information in the college and make it available to the working party;
- make available to the working party documents relating to the formation of an equal opportunities policy (see reference section).

THE EQUAL OPPORTUNITIES POLICY DOCUMENT

There are several examples of positive achievements made in the field of equal opportunities. However, where implementation has occurred without a formal policy, this has generally meant there is a published staffing policy which merely embodies the principle of equal opportunities. The successful pattern for implementation tends to require a policy document to be written and agreed at an early stage in the process.

The working party will have to examine all practices and procedures in all college activities for instances of potential discrimination. (See the reference section of this handbook for Equal Opportunities Commission advice, and two examples.)

The ideal policy document will:

- relate to:

  — the employment of staff, including ancillary workers
  — recruitment of students
  — the curriculum
  — the interface between the institution and its public;

- free the institution from discriminatory practices and procedures;
- promote equality of opportunity;
- be based on up-to-date statistics and other relevant data;
- have considered the views of all interests within the institution;
- include strategies for the implementation of policy with:

  — targets
  — action plans
  — timetables;

- contain guidelines for monitoring the progress of implementation;
- contain agreed grievance procedures;
- be formally adopted through relevant college committee structures, including governors;
- be readily available in accessible form to all members of the organisation;
- be disseminated through the organisation by means of an appropriate training programme.

2. MANAGEMENT ACTIVITIES — THE SECOND STAGE

STATEMENT OF PRINCIPLE

The equal opportunities policy will generate an agenda for action for the college management; the creation of a team, or the designation of responsibility to existing team members will seem appropriate at this stage.

Establishing whatever system is determined will require the commitment of considerable resources, especially since it is important to include people in the team who have the power in the organisation to effect change. However, once equality of opportunity is fully embedded in college systems, the costs of monitoring will be relatively low. The cost to the resource base will therefore be limited to the life span of the main activities required to implement the policy, and the investment will be repaid in terms of the more productive use of resources.

IN PRACTICE

To translate principle into effective practice managers need to:

- secure support/consultancy during the implementation stage;
- maintain the information base created in the first stage;
- take the policy through the college committee structures for ratification and approval;
- plan stages of implementation;
- evaluate the resources needed for implementation;
- allocate resources for implementation;
- designate team responsibilities;
- appoint an equal opportunities officer at a senior level;
- schedule a timetable for implementation;
- set up an equal opportunities monitoring process;
- set up a staff development programme;
- set up an equal opportunities curriculum development programme;
- develop marketing and publicity in line with the equal opportunities policy;
- organise the appropriate facilities required.

3. THE MONITORING PROCESS

STATEMENT OF PRINCIPLE

Whether monitoring equal opportunities policies proves to be a relatively easy task will depend on how sophisticated the college's administrative system is; if records are already being collected, gender statistics can just be added to them. It is possible that whole new procedures for the collection and collation of data will have to be introduced, but since this is sound management practice, it is likely to be in the more general interests of the college to instigate such procedures.

If the system allows for regular collection of data, then the team responsible for implementing equal opportunities policies will have to meet regularly to assess whether the targets specified in the policy document are being met.

The monitoring of attitudes is not such a simple process. Some form of qualitative evidence will have to be collected — this may form part of the needs analysis and evaluation of the training programme in equal opportunities, and could be carried out by consultants experienced in this field.

IN PRACTICE

To translate principle into effective practice managers need to:

- cross-refer the information available from the collection of data about students and staff college to the targets and timetables laid out in the policy;
- relate evidence from this correlation of data to the marketing procedures;
- relate evidence from the information base to staff appointment procedures;
- check implementation of the strategies laid out in the policy;
- examine recruitment procedures for possible discriminatory practices and recommend change if necessary;
- examine publications that reinforce stereotyped images and recommend change if necessary;
- set up an evaluation system for the development programme in equal opportunities;
- cross-refer gender with race and other equal opportunities targets.

4. THE STAFF DEVELOPMENT PROGRAMME

STATEMENT OF PRINCIPLE

Staff development plans which will bring about the implementation of equal opportunities policies and practices in organisations must include, but also go much further than, dissemination about equal opportunities law. There are a range of skills that individuals need to develop before entering management, which draw out the human resource potential of the organisation for its healthy growth; many individuals will already possess skills within this range to varying degrees. However, all managers and potential managers will need to develop these skills for the successful management of the college.

(In the next section of the document, training and development implications for both women and men in organisations are considered. The management development programme contains elements which all managers need to address, and in which individuals will already be competent to varying degrees.)

IN PRACTICE

To translate principle into effective practice managers need to:

- establish staff training in equal opportunities policies and practices for all, which details how the Sex Discrimination Act 1975 affects colleges; describes the college policy and its implementation; and examines attitudes and behaviours which also affect the implementation of equal opportunities policies and practices;
- undertake a series of measures designed to maximise the potential human resource in the organisation, with particular emphasis on promoting equality of professional opportunity;
- set up a management development training programme which develops in both men and women a range of skills and competences for the management of colleges.

5. THE EQUAL OPPORTUNITIES TRAINING PROGRAMME FOR STAFF

STATEMENT OF PRINCIPLE

All staff members within an institution will need to take part in some form of training at some stage if gender equality policies are to be successfully implemented, since the attitudes of staff and students, and one to the other, play a very significant part in discriminatory practices. All those involved in recruitment and selection should participate in the training before taking any further role in interviewing procedures.

Training in equal opportunities is a sensitive process since it necessarily involves the examination of deeply held attitudes about gender roles for both men and women. It is also difficult to avoid the dangers of surface training, where participants rehearse the experience of training, but are only covering their attitudes with new behaviours. They learn to conform with the accepted norm through skilled payment of lip service, while deep seated attitudes remain intact.

For this reason, the recommendation is that external expertise is used for equal opportunities training and that the approach is carefully discussed and agreed in advance with the management team. The training procedures can be enriching if a sympathetic, highly skilled and experienced trainer is involved. But ill-planned or badly delivered training can do much harm to the development of equal opportunities and lead to a hardening of attitudes and skill in avoidance procedures. External evaluation may be particularly helpful to counter this, although, as in the best tradition of experiential training, it is possible for self-help groups to work well if members are committed to the task. Benefits may be obtained by combining training about gender issues with training about special needs and race.

IN PRACTICE

To translate principle into effective practice, managers need to:

- provide an explanation during training of the Sex Discrimination Act 1975 as it affects employment and education;
- provide an explanation of the college policy on equal opportunities, and its targets and action plans for implementation;
- examine during training, attitudes towards gender issues and how they are formed;
- ensure the training programme raises awareness of discriminatory procedures, behaviours and language;
- ensure staff learn about new types of behaviour that promote equality of opportunity;
- ensure the training programme includes information about grievance procedures.

6. RECRUITMENT, APPOINTMENT AND PROMOTION OF WOMEN

STATEMENT OF PRINCIPLE

Positive action by managers is needed to encourage and develop the resource that women represent in their organisation. It is vital that practical and emotional support and encouragement is offered to women already there and to those contemplating joining it. This must be seen to be done, but in a way that is **not** prejudicial to male counterparts.

It is often suggested that women do not apply for senior posts, even where managers would welcome them because they believe their application will prove unsuccessful. Research shows, however, that this is only partly true, and that women are applying to those colleges — and likewise, to organisations in other occupational sectors — which do have a formula for attracting them.

Certain authorities and colleges are developing a reputation as being good places for women to work because their contribution is valued. Therefore it is important for management to publicise the fact that it recognises the contribution that women can make, as a first step to attracting women staff.

Documents provided with job application forms need to say much more than the standard phrase 'we are an equal opportunities employer', as the experience of many women tells them that often this is not reflected in the activities of the organisation. Commitment to a set of values which includes the development of human resources, which will be evident in documents such as the college mission statement, will come under close scrutiny.

Employers need to examine their appointment procedures for any discriminatory practices that might exist. A shift in attitude is needed towards accepting that there may be a broader definition of relevant prior experience. Criteria for appointment needs to be reviewed to see whether traditional requirements such as experience of education and industry are really necessary. Such requirements discriminate against women who have spent years raising children and yet may possess excellent managerial skills.

It is important at all times to ensure that staff understand that positive action to encourage women's professional development does not mean offering them jobs simply because they are women. This is bad for the morale of both men and women in organisations.

IN PRACTICE

To translate principle into effective practice, managers need to:

- offer practical support and personal encouragement to women through sponsoring and mentoring activities;
- acknowledge a broader definition of relevant experience;
- provide opportunities for women for networking in cross-sector, cross-authority, or inter-authority initiatives with other women;
- appoint women to senior posts who can act as role models for others;
- vigorously adopt all of these procedures to encourage women from ethnic minorities to apply for all posts, especially senior positions;
- provide work-based high quality childcare provision;
- create a job-share scheme, using existing successful models — as in many local authorities — up to senior management levels;
- create a career break scheme, using existing successful models — as in many banks and building societies — up to senior management levels;
- emphasise a co-operative management style and its commitment to a value system which states that all members of college staff make an equal contribution to its well-being.

7. THE MANAGEMENT DEVELOPMENT TRAINING PROGRAMME

STATEMENT OF PRINCIPLE

All managers and potential managers, regardless of sex, should be able to demonstrate within this programme, competence, self-awareness and development together with human resource development among other more traditional 'management' skills. The programme aims to develop in both men and women a broader range of competences and skills than hitherto, in order to enable them to manage colleges more effectively in a fast- changing future. It is recognised that many individuals, because of background, training or experience, will be more readily able to demonstrate competence in some aspects of this programme than in others; therefore, a flexible approach to training will be appropriate, together with accreditation of previous training or experience.

Access to management development training must be made available for women, if an equal gender balance is not already evident, either by reserving places or by providing special courses.

The special provision which has previously been made for women has usually consisted of a catch-all short course, often entitled 'Women into Management', based on personal effectiveness and assertiveness training. Although useful, this does not meet the diverse training needs of women at different stages in their career development, and cannot in any way be sufficient training for managers, whether male or female.

IN PRACTICE

To translate principle into effective practice managers need to:

- ensure that the Management Development Training Programme includes:
  - personal effectiveness training
  - interpersonal skills training
  - training leading to self-awareness and self-assessment
  - training in negotiation and staff relations
  - a critique of the politics of organisations
  - training in curriculum development
  - training in financial management
  - training in business and information systems
  - introduction to non-traditional areas of work for men and women.

8. THE FACILITIES REQUIRED FOR IMPLEMENTATION OF EQUAL OPPORTUNITIES

STATEMENT OF PRINCIPLE

It is recognised that setting up facilities which enable the implementation of equal opportunities policies and practices requires resources. However, the development of the adult market for further education, the growing numbers of women returning to education, and the demographic trends which indicate that employers will be competing increasingly for good young staff in the future, all suggest that investment in good facilities is a sound and necessary investment for survival.

Many adults spend part of their lives being a parent: but the sheer lack of proper childcare facilities, and the apparent lack of recognition of parental or other caring responsibilities within the workplace leads to a polarisation of caring tasks. This can cause male absenteeism from the home as well as women's constraint within it. Men can be deprived of the emotional experiences of spending time with their families, and women the stimulus of engagement outside the home.

IN PRACTICE

To translate principle into effective practice managers need to:

- provide a safe environment after college hours, especially when dark;
- set up a nursery, ideally on the premises, which could provide both income, and work placements for those on caring courses;
- provide access to a playscheme held after school hours and during half-term, which could provide income, and work experience for those on caring courses;
- install ramps and lifts to allow easy access for push-chairs;
- establish outreach work in community centres and primary schools, especially for foundation or access courses;
- provide support particularly for those for whom English is a second language;
- provide an educational guidance and counselling service which includes expertise in the needs of women returning to college;
- ensure adequate toilet facilities in areas of the college which have traditionally been single sex;
- ensure hours of study accommodate women's multi-role lifestyles;
- ensure hours of college and union meetings accommodate women's multi-role lifestyles;
- provide separate common rooms for those whose cultural customs make it preferable for them to have single sex accommodation;
- a personal counselling service available to staff and students;
- clear and well-publicised procedures for dealing with sexual harassment.

9. A MODEL FOR CURRICULUM DEVELOPMENT

STATEMENT OF PRINCIPLE

Research and experience point to the fact that equality of opportunity is harder to achieve in curriculum development than in any other area of an institution-type organisation. Bearing in mind both current policies on the resourcing of public sector provision and the increasing numbers of women entering further education, developing the curricula to meet the needs of women will have positive results for the economy of the college. Particular attention needs to be paid to delivery mechanisms, which should fully exploit the potential, for women students of distance and open learning packages, and include a recognition of the importance of affective as well as cognitive learning.

The advent of National Vocational Qualifications and the changes these will require would seem to present an ideal intervention point at which materials and course provision could be made less gender specific.

IN PRACTICE

To translate principle into effective practice managers need to:

- include within curriculum development an analysis of women as a client group in further education in terms of:
  - available employment, both locally and nationally
  - required training
  - delivery mechanisms.
- design courses to meet these needs, for example
  - returner courses
  - access courses
  - taster courses
  - special compensatory provision in non-traditional courses (computing, electronics, physical sciences)
  - access to a range of mainstream courses.

- include, within curriculum development, the accreditation of prior learning;
- examine teaching and learning strategies for discriminatory attitudes, examples or language;
- evaluate and review learning programmes to assess the extent to which they meet the needs of the client group;
- revise and redesign learning programmes in the light of this evidence;
- introduce open learning and distance learning where appropriate, especially in rural areas;
- recognise the role of women-only groups in some areas of the curriculum;
- recognise the importance of women tutors as role models;
- provide outreach work in, for example, women's groups, playgroups, first schools and community centres, as part of curriculum development;
- examine interpersonal relationships between male and female staff and students, leading to the introduction of more appropriate models of behaviour where necessary;
- examine classroom management practices, leading to the introduction of more appropriate models where necessary;
- evaluate and review enrolment and induction processes to ensure that both are welcoming and positive experiences.

10. MARKETING AND PUBLICITY

STATEMENT OF PRINCIPLE

In an increasingly competitive market, the marketing of the college, its services and courses will become increasingly important. It is evident that there is a growing market demand among women for further education, and that for colleges to survive they must tap into and develop this market. Many colleges already have marketing experts within their business studies departments.

IN PRACTICE

To translate principle into effective practice managers need to:

- develop a marketing and publicity policy which includes the careful scrutiny of publicity for discriminatory attitudes which might be reflected in language or visual imagery;
- develop publicity material which, visually and verbally, positively seeks to attract women;
- promote equal opportunities in college publications;
- liaise with schools where possible to introduce girls at the pre- GCSE option choice at 13 to the availability of careers in trades and professions traditionally considered appropriate for men;
- run taster courses;
- run open days for women returning to college;
- use non-traditional role models to encourage girls;
- design and aim some materials specifically at girls and women, and target these more precisely;
- liaise with adult education providers, particularly in the fields of new opportunities for women, or return to work courses;
- liaise with voluntary agencies that have a particular commitment to women, e.g. the National Federation of Womens Institutes, Pre-School Playgroups Association, and the Natural Childbirth Trust.

11. MANAGEMENT ACTIVITIES — THE THIRD STAGE

STATEMENT OF PRINCIPLE

Having set up strategies for the implementation of equal opportunities practices through a team or a designated person, managers will need to give constant support for the programme to achieve some degree of success. They should take responsibility for implementation of the measures, ensure that the monitoring processes take place and, if targets are not being met within the agreed time schedules, take compensatory action.

IN PRACTICE

To translate principle into effective practice managers need to:

- allocate resources for implementation of policy;
- provide continuing leadership in the value system which embodies equal opportunities;
- maintain a staff appointments procedure in accordance with policy;
- supervise the monitoring of policy and practice;
- establish and maintain a gender balance on college committees and governing bodies;
- maintain, while necessary, an equal opportunities consultative committee linked into the formal college committee structure;
- develop and maintain a user-friendly atmosphere in the organisation, particularly for girls and women in non-traditional areas of work and study.

APPENDIX 1. EQUALITY IN THE COLLEGE: THE LEGAL POSITION

Chris Fernie, Equal Opportunities Commission

The statutory framework for upholding and advancing equality of opportunity between women and men is contained in the Sex Discrimination Act 1975. The Act makes sex discrimination unlawful in the provision of employment, education, and goods, facilities and services. Discrimination on the ground of sex is defined in two ways: direct and indirect.

i) Direct discrimination occurs where a person of one sex is treated less favourably than a person of the opposite sex in similar circumstances.

ii) Indirect discrimination occurs where a condition or requirement is applied to persons of both sexes, but a considerably smaller proportion of persons of one sex can comply with it; and the inability to comply with it is to the detriment of a person of that sex; and the condition or requirement cannot be shown to be justifiable, irrespective of the sex of the person to whom it is applied.

The Act has an important bearing on colleges in respect of their roles as providers of education and as employers. In relation to the former, Section 22 of the Act states that it is unlawful for a college to discriminate against a woman (or a man) on the ground of sex:

'(a) in the terms on which it offers to admit her to the establishment as a pupil, or

(b) by refusing or deliberately omitting to accept an application for her admission to the establishment as a pupil, or

(c) where she is a pupil of the establishment

(i) in the way it affords her access to any benefits, facilities or services, or by refusing or deliberately omitting to afford her access to them, or

(ii) by excluding her from the establishment or subjecting her to any other detriment.'

Here are some examples of what colleges can do in practice to avoid sex discrimination in their treatment of students:

- prospectuses and leaflets should state that courses are equally open to women and men, and care should be taken to ensure that nothing appears in publications which suggests otherwise; for example:
  - students of both sexes should be depicted in texts and illustrations
  - publicity should address both sexes and avoid phrases such as '. . .courses for boys seeking a career in the building industry'
  - the conditions of admission must be the same for women and men;
- colleges should not place any entry requirement on students which cannot be justified as necessary and which might be construed as indirect discrimination; for example:
  - by insisting that students must have had previous experience in an industry or occupation which has not traditionally employed people of their sex
  - by insisting that students must have had a minimum period of continuous employment;

  colleges should not discriminate against women in selection for admission to courses on the grounds that, as women, they could less easily follow a course; for example

— by assuming that women would not be able to fit into the 'rough and tumble' of workshops

— women would find it difficult to obtain a training placement during the course or employment upon completion of their training;

admissions tutors should not ask questions in interviews (e.g. about child-care arrangements) which might be interpreted by the interviewee as being discriminatory in intent or in effect;

colleges should ensure that women and men are given equal access to institutional facilities for social, academic and leisure activities.

Equal treatment of women and men is the primary requirement of the Act. However, for colleges seeking to alleviate the cumulative effects of sex discrimination there is a legitimate exception to this requirement; that is, section 47 of the Act which allows positive action to be taken whereby people who are the absent or minority sex in particular occupations can be encouraged to enter, or be trained for, those occupations usually in the form of single-sex courses. In order to mount a single-sex course under Section 47, a college would have to comply with the following criteria:

'Nothing in parts II to IV (of the Act) shall render unlawful any act done in relation to particular work by any person in, or in connection with —

(a) affording women only, or men only, access to facilities for training which would help to fit them for that work, or,

(b) encouraging women only, or men only, to take advantage of opportunities for doing that work,

where it reasonably appears to that person that at any time within the 12 months immediately preceding the doing of the act there were not persons of the sex in question doing that work in Great Britain, or the number of persons of that sex doing the work in Great Britain was comparatively small.'

Section 47(2) concerns the need for positive action where there are local skills shortages:

'Where in relation to particular work it reasonably appears to any person that although the condition for the operation of subsection (1) is not met for the whole of Great Britain, nothing in Parts II to IV (of the Act) shall render unlawful any act done by that person in, or in connection with —

(a) affording persons who are of the sex in question, and who appear likely to take up that work in that area, access to facilities for training which would help to fit them for that work, or

(b) encouraging persons of that sex to take advantage of opportunities in the area for doing that work.'

Section 47(3) makes specific reference to positive action training for people who have had a career break for domestic or family reasons:

'Nothing in Parts II to IV (of the Act) shall render unlawful any act done by any person in, or in connection with, affording persons access to facilities for training which would help to fit them for employment, where it reasonably appears to that person that those persons are in special

need of training by reason of the period for which they have been discharging domestic or family responsibilities to the exclusion of regular full-time employment.

The discrimination in relation to which this subsection applies may result from confining the training to person who have been discharging domestic or family responsibilities or from the way persons are selected for training, or both.'

Advice on the applicability of Section 47 in particular cases can be obtained from the Equal Opportunities Commission.

With regard to the role of colleges as employers, section 6 of the Act refers to the sex discrimination against potential and existing employees.

It states:

'1. It is unlawful for a person, in relation to employment by him at an establishment in Great Britain, to discriminate against a woman —

(a) in the arrangements he (sic) makes for the purpose of determining who should be offered that employment,
or

(b) in the terms on which he offers her that employment, or

(c) by refusing or deliberately omitting to offer her that employment.

2. It is unlawful for a person, in the case of a woman employed by him at an establishment in Great Britain, to discriminate against her —

(a) in the way he affords her access to opportunities for promotion, transfer or training or to any other benefits, facilities or services, or by refusing or deliberately omitting to afford her access to them, or

(b) by dismissing her, or subjecting her to any other detriment.'

The Act also requires that married people should not be treated less favourably than single people of the same sex. The number of complaints of sex discrimination has risen substantially in recent years and industrial tribunals have found in favour of the complainant in a number of instances. Examples of situations in which unlawful sex discrimination has been found include:

- Hay v Lothian Regional Council (non-selection for interview)
- Gates v Wirral Borough Council (questions at interview)
- Dick v University of Dundee (part-time teaching and selection for redundancy)
- Budge v Tayside Regional Council (arrangements for determining who should be offered employment, and criteria for selection)

The examples quoted above illustrate the fact that discrimination does occur in relation to teacher/lecturer employment, and that there is a need for employment policies and practices which are consistent and which provide equal opportunities for women and men. There is much that can be done by employers. This includes not only carefully examining employment procedures and practices, but also giving encouragement and support to women teachers/lecturers to apply and to persist in making applications for positions of responsibility in colleges if they are suitably qualified to do so.

In conclusion, the Act makes it unlawful for colleges to discriminate on the ground of sex against students, and on the grounds of sex and marriage against employees. Strict compliance with the provisions of the Act is, of course, essential. However, genuine equality of opportunity will not be achieved solely by a basic compliance with the Act; it will only be achieved by the commitment and the effort to devise and implement equal opportunities policies, to monitor the operation of such policies, and to take such further steps as the monitoring reveals to be necessary.

APPENDIX 2. HOW TO SET UP AND IMPLEMENT AN EQUAL OPPORTUNITIES POLICY

Helen Clarke, Equal Opportunities Commission

A 'blueprint' for implementing individual equal opportunities policies, cannot be provided, since these policies would be very dependent upon the size, type and location, etc., of the institution. Nevertheless, there are certain general principles that apply which are outlined below.

WHAT IS AN EQUAL OPPORTUNITIES POLICY?

Before discussing how to implement an equal opportunities policy, it is vital to know what is meant by the term. There are three different definitions which are, or could be, applied to such policies:

(a) a statement of intent

(b) a policy for the employment of staff

(c) a policy relating to the employment of staff, including ancillary workers, recruitment and curriculum of students and the interface between the institution and the general public.

The third option is regarded as being the valid one and this analysis is based upon this definition.

Having decided what an equal opportunities policy is, what it should cover in terms of discrimination areas needs to be worked out. At a minimum it should cover discrimination in terms of sex, race and disability which are statutory requirements, but it could go further into, for example, social class. It should also encourage equal opportunities rather than just ensuring that the institution is complying with the law.

WHAT DO YOU HOPE TO ACHIEVE?

Define what it is that is being attempted. Is it a case of just wanting an institution which is free from discriminatory practices and procedures? Or should policies go further than that and actually promote equality of opportunity in general within the institution? There are practices which are either directly or indirectly discriminatory; definitions of these terms are included in the EOC's booklet *A Model Equal Opportunities Policy*, and these should be noted. There are also practices which the institution may wish to implement in order to promote equality of opportunity, particularly within the student population (it is recommended to make reference to these in the policy document). A good policy helps the whole organisation.

NOW WE KNOW WHAT WE MEAN BY AN EQUAL OPPORTUNITIES POLICY — WHERE DO YOU START?

Draw up a policy — it is very important when drawing up a policy that there is some commitment from the top of the institution. It has been shown in other institutions that if a directive comes from the top of the institution then there are fewer problems when trying to implement policy.

However there have been three main ways of working towards producing a policy and these are through:

- a working party
- the academic board
- an individual or combination of people

Any of these combinations can be used when drawing up a policy. However, it is usually easier if the policy is drawn up by a working party or an academic board; for an individual or group of individuals to have to do this is often very difficult. There are various steps in actually setting up and implementing a policy which are divided up as follows.

THE FIRST STEP — THE POLICY

The first thing to do when actually drawing up a policy is to gather the facts which pertain to a particular institution. These should include a statistical breakdown of the staff at each grade and a breakdown of the ancillary staff. Statistical information on the student complement within the institution should also be collated, showing the numbers of students: by gender; applying for particular courses within the institution; and the numbers of students from each sex who are being accepted on the courses. It is also helpful in this context if besides producing statistics to show the sex differentiation in staff and students, there is a breakdown on the race differentiation for the staff and for the students. This would avoid 'missing out' on the black women and black students within the institution.

This statistical breakdown will then provide the basis on which to draw up a policy, and to identify the areas in which action is required. When drawing up the policy, contact all groups involved within the institution; this will ensure that all the views on the subject held by the people within the institution have been taken into account, and this, in turn, will help to convince them that the policy is for their benefit as well as for everybody else within the institution. You should now be in a position to write a formal policy. Identify the areas which need to be covered, and the areas in which action needs to be taken.

THE SECOND STEP — IMPLEMENTATION

Once a policy has been drawn up it is no use just letting it lie — the policy must work in practice; it is not just a paper exercise. Therefore a strategy to implement the policy needs to be decided and agreed upon. Looking at the statistics should identify where action is necessary. Also, examine the policies and practices of the institution for all categories of people within it, and look also for the non-quantifiable/sociological issues — for example, home backgrounds of students, and the students own images of their roles, etc. In other words, it is necessary to go beyond what is strictly unlawful practice and examine other areas which will actually help the students themselves. It is important that someone within the institution is made responsible for the implementation of the policy, preferably someone with a responsible position who is able to effect changes. In this context, it is necessary to remember that the college or the institution is responsible for the actions of its own employees under section 41 of the Sex Discrimination Act, and it is therefore in the interests of the institution to be able to show that it has done everything possible to ensure that there are no unlawful practices taking place within the institution.

It is extremely important in implementing a policy to ensure that everybody within the institution knows about it and knows who to go to if they wish to make any complaints. Methods of publicising the policy to all staff and students should be devised. This may take the form of sending each member of staff and each student a copy of the policy itself. Alternatively, place copies of the policy in areas where they will be seen by all the students. Having made everybody aware of the policy, set targets for implementing the terms and conditions included in it. In this context, targets should be set for achieving aims in both the long term and the short term. Once these targets have been set, you should then devise plans to ensure their achievement. An action plan is a very important

part of the implementation of any equal opportunities policy and there are three main ingredients which should be contained in it:

- targets or goals
- actions
- timetables

Targets, or goals as they are sometimes called, should be very specific and should contain a reference to precise achievement intentions. The target or goal is critical to any effective action planning; any uncertainty about achievement intentions will leave others unaware and could cause the whole plan to fail.

The second ingredient of action planning is the action or actions themselves. For each target or goal you have set yourself, having a very clearly specified set of actions will help you achieve them. Each action should say exactly how the stated target or goal will be achieved.

The third ingredient of action planning is the timetable. If no date is set for completion of each individual action, it is possible that the whole plan will lose its impetus.

It is important to consider seriously what resources might be required in order to carry out the plan. Providing the finance to make the policy work is the first step in setting out how the targets will be achieved.

THE THIRD STEP — MONITORING

Monitoring should be a continuous and integral part of any equal opportunities policy. It is only by this means that one can determine whether targets are being met and whether the policy is proving successful or whether it needs some alteration. Specify which figures are required to carry out an effective monitoring programme. For example, it is meaningless to say that 25% of students on a particular course are women if this number is not related back to a breakdown of the number of applications for that particular course. When monitoring, analyse race and sex together for this will ensure that particular groups, for example black women, are not missed out. When all monitoring is completed, review the situation in general, and make any necessary changes to the procedures.

THE FOURTH STEP — TRAINING

Training is an integral part of implementing any equal opportunities policy and should be made available to all staff who are involved in the admission of students or in the recruitment of staff for the institution. Once this training has been completed, ensure that all other staff, including ancillary staff, have also been trained and are aware of their rights under the sex discrimination legislation and other relevant legislation, and are aware of the contents of their institution's own equal opportunities policy.

Once a programme of work to implement the policy and to train the staff is devised and put into practice, some form of positive action may be considered. Positive action in this context relates to training courses offered by the institution. The Sex Discrimination Legislation provides for this sort of positive training under section 47.

Remember a good policy benefits everyone

APPENDIX 3. A SAMPLE EQUAL OPPORTUNITIES POLICY DOCUMENT

This policy is a working document written by Jill Warwick in conjunction with the Stoke on Trent college equal opportunities working party.

1. INTRODUCTION

Realistic goals will be set, with yearly targets, to achieve the college's long-term objectives for the employment and representation of women, black people, members of ethnic minority groups and disabled people, both within the college and within the curriculum.

1.1 The college believes education is a right for all who can benefit from it.

1.2 The college will actively work towards offering equality of opportunity to all students and staff regardless of age, race, disability, gender, marital status, nationality and faith.

1.3 All participants in the educational process will be aware that they have a legal and a moral duty to play their part in this.

1.4 Positive steps will be taken to ensure no forms of unlawful discrimination occur.

2. ACCESS TO, AND PARTICIPATION, IN EDUCATION

2.1 A clear statement of the college's commitment to equal opportunities will be given in all college publications.

2.2 College admissions systems will be free from bias.

2.3 The college will make full-time child-care provision available.

2.4 All areas of the college will be accessible to all students.

2.5 The college will consider the needs of those on low incomes.

2.6 The college programme will reflect the needs of the local community.

3. THE SELECTION, RECRUITMENT AND PROMOTION OF STAFF

3.1 Recruitment for all positions within the college will be carried out in a manner which accords with equal opportunities practice.

3.2 All appointing panels will have undertaken training in recruitment and selection practices and procedures.

3.3 Recruitment and selection training will address equal opportunities issues.

3.4 Job sharing will be encouraged.

3.5 Where part-timers perform similar work to full time employees, they will receive the same pro rata terms and conditions.

4. MARKETING, PUBLICITY AND PUBLIC LIAISON

4.1 The college will research the needs of disabled people, women and ethnic minorities and the local labour market trends in order to provide appropriate training for employment.

4.2 College publicity will reflect equality of opportunity, and will be available in public places throughout the community.

4.3 Liaisons with Jobcentres, community centres, voluntary organisations, churches and local industry will be created, developed and maintained.

4.4 Publicity material aimed at minority groups will be in appropriate languages and media.

4.5 Outreach activity will be undertaken to stimulate interest and generate local involvement for people not currently attending college.

5. CURRICULUM

Curriculum encompasses needs analysis, subject content, student-centred and work related teaching and learning, assessment of students and evaluation of provision in the light of aims and values.

5.1 The college will provide planning, teaching styles and resources for equality of opportunity.

5.2 Resource materials used to deliver the curriculum shall be free from racist, sexist and other discriminatory assumptions, images and language.

5.3 Curriculum design will take full account of progression and access, and the accreditation of prior learning and experience.

5.4 The college will provide opportunities for open learning.

5.5 The college will meet the needs of the long term unemployed, or those returning to work after a period of domestic commitment.

5.6 Women-only courses will be offered under Section 47 of the Sex Discrimination Act in curriculum areas traditionally perceived as male areas of work.

5.7 The college will provide special courses to give a second chance to people whose linguistic or cultural background, gender or other stereotyping, have made it difficult for them to benefit from education.

5.8 The college will recognise the importance of teaching community language and literature.

5.9 English as a second or other language will be provided across the curriculum.

5.10 The college will encourage the integration of students with disabilities into the college. Students with learning difficulties will be offered individualised programmes of study to assist them where necessary.

6. THE COLLEGE ENVIRONMENT

6.1 The college will create an environment in which all students feel comfortable, regardless of race, gender or disability.

6.2 All students will receive a positive welcome from the first point of contact.

6.3 Guidance and counselling given to students, or potential students will be non-discriminatory in terms of gender, race and disability.

7. CODE OF PRACTICE FOR PERSONAL HARASSMENT

Personal harassment is behaviour which is objectionable and offensive and which might threaten the victims security or create an intimidating or hostile environment which may hinder them in their performance. The college will not tolerate harassment, and sees it as a form of discrimination.

7.1 The college will be responsible for establishing procedures to deal with discriminatory incidents of this kind.

7.2 A senior member of staff will be designated to deal with these incidents in the first place. From this point, standard college grievance and disciplinary procedures will be followed.

7.3 All staff and students will be informed of these procedures.

7.4 In addition to dealing with the offender, the college will provide support for the victim.

8. STAFF DEVELOPMENT

8.1 All staff will be aware of their responsibilities for implementing the college's equal opportunities policy.

8.2 There will be a training programme for all staff and governors on the implementation of this equal opportunities policy.

8.3 Positive action will be taken to offer opportunities to disadvantaged groups for training and promotion.

8.4 Proper career paths will be established in areas of work perceived to be of low status, where women are traditionally employed.

9 MONITORING AND EVALUATION

9.1 The college will establish an Equal Opportunities Standing Sub-Committee of the Academic Board to monitor and evaluate progress.

9.2 This committee will be chaired by the Director or a nominated deputy. It will be composed of:

Heads of faculty
Elected staff representatives from each faculty
Elected student representatives
Elected union representatives

9.3 The committee will be empowered to co-opt members of relevant organisations.

9.4 The committee will ensure that the college:

i) gathers statistics about staff and students on the basis of race, gender and disability at the point of enquiry, entry and all stages of progression;

ii) holds regular analysis of these statistics to identify specific areas of under-representation;

iii) relates this evidence to marketing, recruitment and selection procedures;

iv) checks the implementation of all equal opportunities programmes;

v) screens recruitment procedures and college publications for bias;

vi) requires at faculty, school and division course team level the incorporation of this equal opportunities policy in the planning and review of provision;

vii) ensures that all plans include specific targets and timetables for implementing equal opportunities (to be reviewed and evaluated at regular intervals);

viii) reports regularly on the implementation of equal opportunities to the Academic Board.

Further Education Unit

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Objectives

The objects for which The Further Education Unit (FEU) is established are to promote, encourage and develop the efficient provision of further education in the United Kingdom and for that purpose:
a) to review and evaluate the range of existing further education curricula and programmes and to identify overlap, duplication, deficiencies and inconsistencies therein;
b) to determine priorities for action to improve the provision of further education and to make recommendations as to how such improvement can be effected;
c) to carry out studies in further education and to support investigations of and experimentation in, and the development of, further education curricula and to contribute to and assist in the evaluation of initiatives in further education;
d) to disseminate and publish information, and to assist in the dissemination and publication of information, about recommendations for and experiments and developments in further education.

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EQUAL OPPORTUNITIES